FORTREND SECURITIES

Research Report

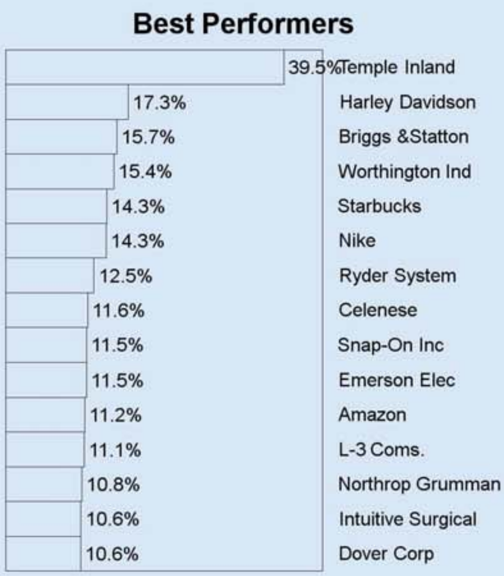
8 July 2011

Joe Forster
Chief Executive Officer

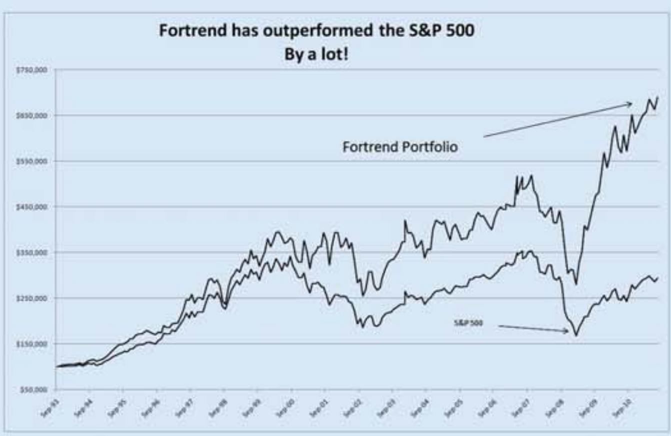
Relative Value Model

In June the S&P 500 rose 3.0%, and earnings estimates were increased by 0.4%. The forward P/E rose 2.6% resulting in an increase to 11.6. The 10 year treasury yield rose to 3.18%

Take profits in Nike. We only added it three months ago, as an opportunistic investment, but it surged more than 20% and is now overvalued.



Electrical Manufacturing Equipment surged 7.5% while Aerospace & Defense soared 6.7% (I don't know why with the pressure on US budgets. Restaurants & Lodging rose 7.3% with board market support for Manufacturing, Transportation, Auto and other export industries. The weak points in the market were Telco's and Semiconductors, which both fell during a strong month.



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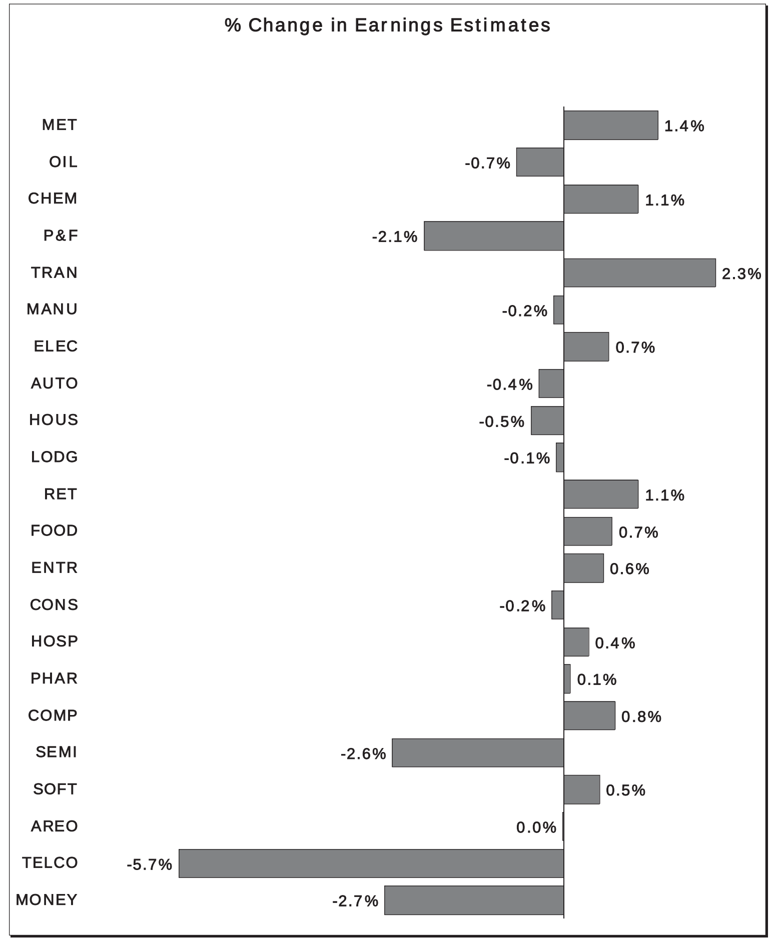
June 5th - July 1st

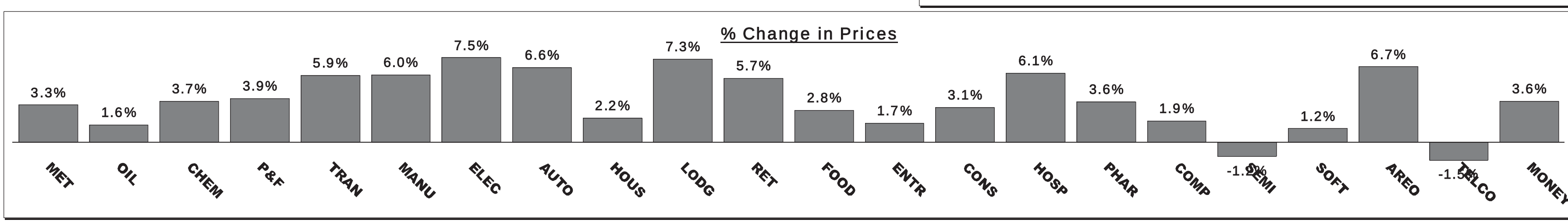
Relative Value Model

	July 2011
Plus Percentage Change in Price/Book	2.5%
Minus Percentage Change in ROE 2012..................	-0.1%
Equals Percentage change in P/E 2012	2.6%
Current P/E 2012	11.9
10 year Treasury Yield	3.2%
Equity Discount / Premium	-165%

	Nov 10	Dec 09	Dec 08	Dec 07	Dec 06	Dec 05
Forcasted P/E..	17.1	18.1	17.5	15.0	15.6	15.8
10 year Treasury Yield	4.1%	4.6%	4.2%	4.3%	4.4%	4.6%
Equity Discount / Premium	-43%	-20%	-36%	-54%	-45%	-38%

	Dec 04	Dec 03	Dec 02	Dec 01	Dec 00	Dec 99
Forcasted P/E..	17.1	18.1	17.5	22.4	20.8	25.9
10 year Treasury Yield	4.1%	4.6%	4.2%	4.4%	5.5%	6.2%
Equity Discount / Premium	-43%	-20%	-36%	-3%	13%	38%





NVIDIA	$ 15.725 NEW BUY
Market Capitalization	**$ 9.4bil**
Sales ’12	**$ 4.1bil**
Profit ’12	**$ 0.6bil**
P/E ’12 (Jan)	**11.7**

NVIDIA Corporation designs, develops, and markets three dimensional (3D) graphics processors and related software. The Company's products provide interactive 3D graphics to the mainstream personal computer market.

Bad news creates an opportunity, we picked Nike and now we move to NVIDIA, the graphics chip kings.

NVIDIA designs high-def 2-D and 3-D graphics processors for gaming and industrial design applications. Their graphics ships are used by leading PC makers Apple, Dell and Hewlett-Packard as well as add-in boards and motherboards produced by ASUSTek, PNY Tech and others. In addition they provide complimentary driver software & chipsets.

Approximately 75% of sales come from the biggest growth region; Asia and more specifically China and Taiwan.

NVIDIA is pushing into the Tablet market and shipped their 10-millionth Tegra Chip in June, 50% of the Tegra chips go into Tablets & Smartphones. With no exposure to RIMM (Blackberry) they are well positioned in the smartphone/tablet arena, this enables them to diversify their business and reduce the dependence on chips used in PC’s. GPU products stand to benefit from back-to-school and share gains.

NVIDIA recently acquired the tightly held Icera Inc. for $367 mill adding radio processors needed in phones and tablets, managements recent 2Q12 guidance does not include 2 months of Iceras operating results. Having the ability to offer Tegra and a radio chip will double NVIDIA’s opportunity for revenue from each device.

The stock price fell 12.5% this month, and is looking to be oversold. NVIDIA reported earnings of $1.02 bill vs estimates of $990.4 mill. With volatility in the market we would expect to see 20% upside over the shorter term, we are making a trade and taking advantage of current circumstances. Don’t miss the boat, speak to your advisor and buy today.

Nike	$ 93.66 SELL
Market Capitalization	**$ 44.4bil**
Sales ’12	**$ 23.0bil**
Profit ’12	**$ 2.3bil**
P/E ’12 (May)	**16.7**

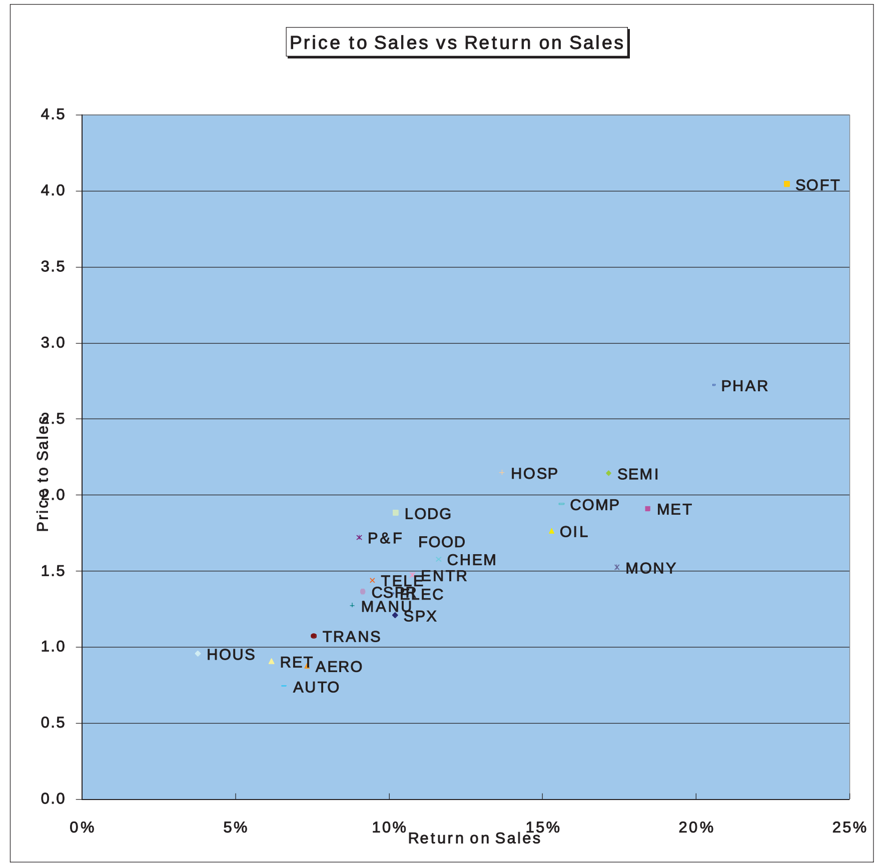
NIKE, Inc. designs, develops, and markets athletic footwear, apparel, equipment, and accessory products for men, women, and children. The Company sells its products worldwide to retail stores, through its own stores, subsidiaries, and distributors.

We swooshed on this opportunity! Nike fell 15% after missing estimates for the first time in 19 quarters and was oversold in our opinion. The stock price is up over 20% from when we recommended buying. We are now taking profits and applying a similar strategy to NVIDIA.

THE RELATIVE VALUE MODEL

Company	Code		Price	X Shares Outstanding	=	Market Cap	Equity 10A	EPS 11E	Div 11E	=	Equity 11E	EPS 12E	Div 12E	=	Equity 12E	Price/ Book	ROE 12E	Projected Sales 12E	Price/ Sales	ROS 12E	P/E 12E	Yield
S&P 500	***SPX***	SPX Ir	1,340	1	=	1,340	596	99.58	26.00	=	669	112.91	28.47	=	754	**1.9**	**15.9%**	1,107	**1.2**	**10.2%**	11.9	2.1%
RAW MATERIALS																						
Metals	***MET***		45.67	477	=	19,328	8,241	4.15	0.80	=	9,624	4.87	0.81	=	11,221	**2.2**	**22.4%**	13,150	**1.9**	**18.4%**	10.5	2.0%
Oil	***OIL***		81.15	1,262	=	104,250	45,913	6.96	1.26	=	53,830	7.82	1.33	=	62,387	**1.9**	**16.9%**	119,290	**1.8**	**15.3%**	11.3	1.7%
INDUSTRIAL CYCLICAL																						
Chemicals	***CHEM***		77.97	287	=	16,833	4,784	5.81	1.16	=	5,619	6.27	1.24	=	6,599	**3.2**	**24.0%**	13,921	**1.6**	**11.6%**	13.3	1.7%
Paper, Forest Packagin	***P&F***		35.57	212	=	7,507	2,716	1.91	1.14	=	2,926	2.37	1.19	=	3,215	**3.2**	**18.3%**	7,462	**1.7**	**9.0%**	23.2	2.9%
Transportation	***TRANS***		51.53	450	=	19,530	5,403	2.87	0.73	=	6,294	3.69	0.79	=	7,490	**3.3**	**22.7%**	22,813	**1.1**	**7.5%**	14.2	1.2%
Manufacturing	***MANU***		59.27	231	=	15,093	4,041	3.73	1.07	=	4,689	4.38	1.13	=	5,487	**3.1**	**23.4%**	11,080	**1.3**	**8.8%**	13.6	1.7%
Electrical	***ELEC***		74.83	1,433	=	47,352	18,887	4.76	1.15	=	21,024	5.63	1.24	=	23,673	**3.0**	**22.6%**	35,873	**1.4**	**10.1%**	13.2	1.8%
CONSUMER CYCLICAL																						
Automobile	***AUTO***		43.75	505	=	11,782	1,695	3.23	0.35	=	2,788	4.17	0.37	=	4,057	**2.5**	**25.8%**	23,786	**0.7**	**6.6%**	10.3	0.8%
Housing	***HOUS***		98.60	165	=	4,213	2,116	4.15	0.61	=	2,202	5.70	0.65	=	2,356	**2.1**	**11.0%**	5,789	**1.0**	**3.8%**	10.8	1.7%
Lodging	***LODG***		62.89	395	=	19,092	4,689	2.46	0.72	=	5,279	2.93	0.81	=	5,963	**4.3**	**22.8%**	9,319	**1.9**	**10.2%**	19.4	2.0%
Retail	***RET***		74.31	662	=	37,154	11,591	4.09	0.64	=	13,272	4.73	0.66	=	15,209	**2.8**	**17.7%**	65,018	**0.9**	**6.2%**	15.3	1.6%
CONSUMER NON-CYCLICALS																						
Food	***FOOD***		47.38	738	=	38,024	9,250	2.78	1.32	=	10,435	3.05	1.43	=	11,769	**4.4**	**29.1%**	21,857	**1.7**	**10.7%**	15.6	3.1%
Entertainment	***ENTR***		55.24	819	=	27,890	11,908	2.93	0.46	=	13,349	3.48	0.47	=	15,097	**3.9**	**23.4%**	19,769	**1.5**	**10.8%**	14.1	1.1%
Consumer Prod.	***CSPR***		57.18	500	=	30,225	8,107	3.21	1.05	=	9,108	3.68	1.15	=	10,205	**4.1**	**28.0%**	16,515	**1.4**	**9.1%**	18.8	2.0%
Health Care	***HOSP***		80.71	515	=	22,012	8,455	4.38	0.59	=	9,719	4.89	0.68	=	11,120	**2.6**	**17.4%**	26,402	**2.1**	**13.7%**	14.6	1.1%
Pharmaceuticals	***PHAR***		48.32	1,734	=	65,419	25,279	3.61	0.96	=	28,863	3.62	1.02	=	32,449	**2.5**	**18.8%**	25,530	**2.7**	**20.5%**	14.4	2.4%
TECHNOLOGY																						
Computers	***COMP***		70.92	1,402	=	73,569	18,421	5.17	0.28	=	23,987	5.89	0.31	=	30,162	**2.7**	**21.7%**	45,774	**1.9**	**15.6%**	12.4	0.4%
Semiconductors	***SEMI***		22.13	1,057	=	22,155	8,706	1.59	0.24	=	10,166	1.74	0.24	=	11,787	**2.6**	**21.0%**	10,972	**2.1**	**17.2%**	12.4	0.9%
Software	***SOFT***		83.07	1,484	=	56,297	14,891	5.00	0.23	=	18,515	5.74	0.25	=	22,521	**3.3**	**18.9%**	16,970	**4.0**	**23.0%**	18.1	0.7%
Aerospace	***AERO***		72.18	327	=	24,088	7,259	5.75	1.39	=	8,432	6.49	1.53	=	9,832	**3.0**	**25.0%**	28,981	**0.9**	**7.3%**	11.7	2.1%
Telecom	***TELE***		31.64	1,675	=	50,111	28,834	2.01	0.75	=	30,103	2.30	0.77	=	31,747	**1.8**	**11.6%**	38,821	**1.4**	**9.5%**	14.5	2.1%
Financial Inst.	***MONY***		45.88	3,107	=	89,360	109,929	4.42	0.51	=	117,781	5.41	0.68	=	127,123	**1.0**	**10.4%**	62,571	**1.5**	**17.4%**	8.8	1.6%

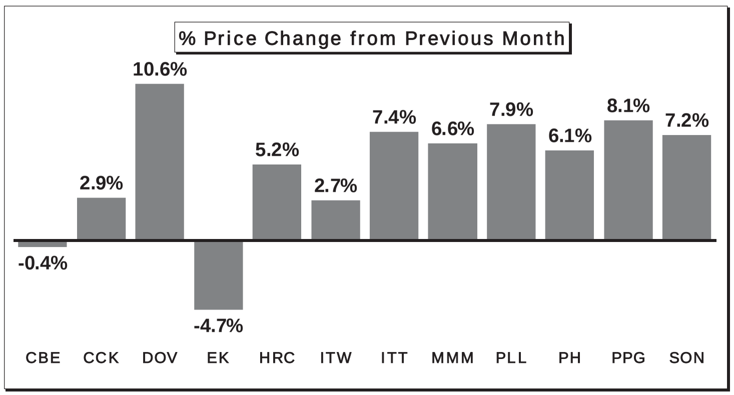
FORTREND SECURITIES

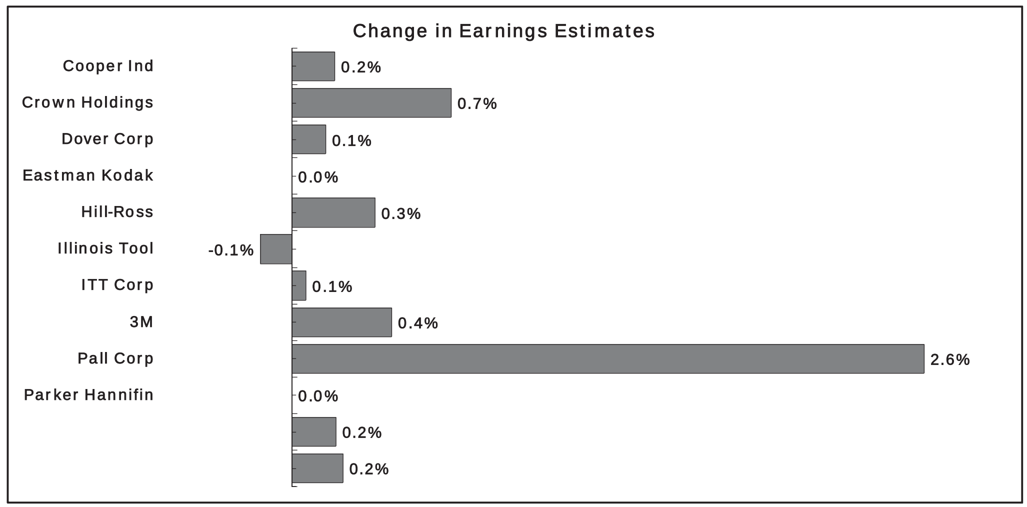


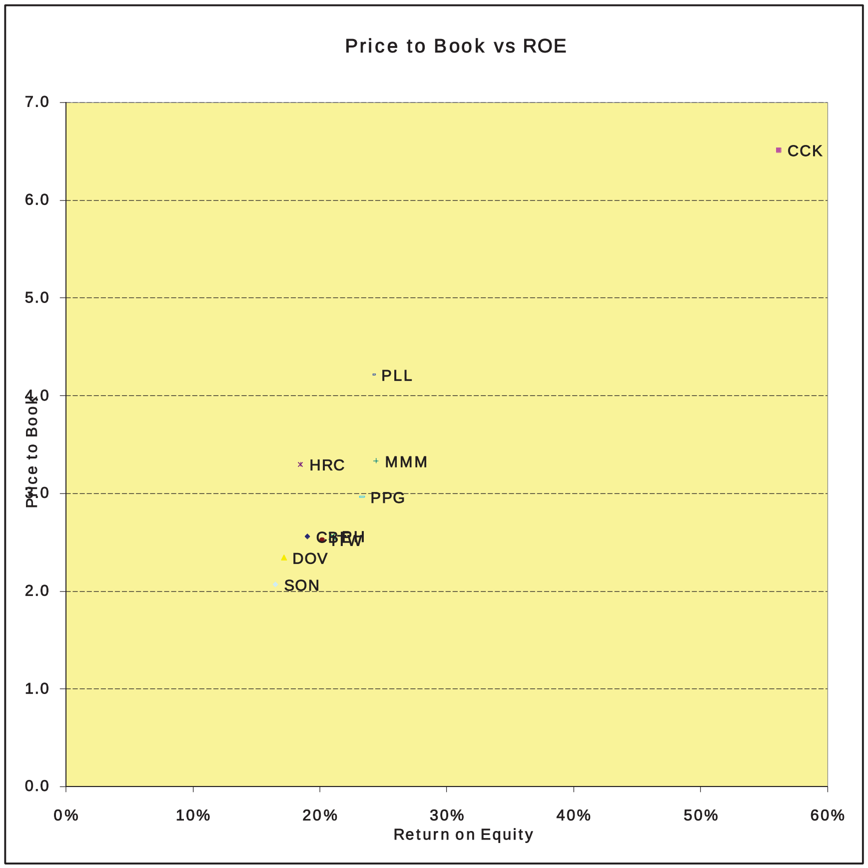
MANUFACTURING

Company	Code		Price	X Shares Outstanding	=	Market Cap	Equity 10A	EPS 11E	Div 11E	=	Equity 11E	EPS 12E	Div 12E	=	Equity 12E	Price/ Book	ROE 12E	Projected Sales 12E	Price/ Sales	ROS 12E	P/E 12E	Yield	FYE
Cooper Ind	*CBE*	CBE U	61.10	165	=	10,083	3,206	3.94	1.16	=	3,664	4.54	1.22	=	4,211	2.6	19.0%	5,798	1.7	12.9%	13.5	2.0%	Dec
Crown Holdings	*CCK*	CCK U	39.23	156	=	6,118	229	2.86	-	=	676	3.38	-	=	1,203	6.5	56.2%	9,165	0.7	5.8%	11.6	0.0%	Dec
Dover Corp	*DOV*	DOV U	69.09	187	=	12,891	4,527	4.42	1.13	=	5,140	5.07	1.20	=	5,861	2.3	17.2%	9,005	1.4	10.5%	13.6	1.7%	Dec
Eastman Kodak	*EK*	EK US	3.07	269	=	826	(1,075)	(2.19)	-	=	(1,665)	(0.83)	-	=	(1,888)	NM	NM	5,888	0.1	-3.8%	NM	0.0%	Dec
Hill-Rom	*HRC*	HRC U	47.33	63	=	2,990	716	2.33	0.42	=	836	2.65	0.42	=	977	3.3	18.5%	1,679	1.8	10.0%	17.9	0.9%	Sep
Illinois Tool	*ITW*	ITW U	57.61	500	=	28,808	9,381	3.96	1.44	=	10,640	4.60	1.52	=	12,182	2.5	20.2%	20,229	1.4	11.4%	12.5	2.6%	Dec
ITT Corp	*ITT*	ITT US	59.85	184	=	11,018	4,505	4.63	1.12	=	5,150	5.16	1.18	=	5,882	2.0	17.2%	11,854	0.9	8.0%	11.6	2.0%	Dec
3M	*MMM*	MMM U	96.67	711	=	68,692	16,017	6.31	2.22	=	18,923	7.09	2.37	=	22,279	3.3	24.4%	32,613	2.1	15.4%	13.6	2.4%	Dec
Pall Corp	*PLL*	PLL U	57.79	116	=	6,722	1,182	2.89	0.66	=	1,442	3.32	0.69	=	1,747	4.2	24.2%	2,929	2.3	13.2%	17.4	1.2%	Jul
Parker Hannifin	*PH*	PH US	91.58	162	=	14,852	4,459	6.37	1.20	=	5,298	7.50	1.40	=	6,287	2.6	21.0%	13,585	1.1	9.0%	12.2	1.5%	Jul
PPG Industries	*PPG*	PPG U	91.85	158	=	14,526	3,833	6.61	2.31	=	4,514	7.22	2.37	=	5,282	3.0	23.3%	15,422	0.9	7.4%	12.7	2.6%	Dec
Sonoco Products	*SON*	SON U	36.05	100	=	3,594	1,508	2.58	1.15	=	1,651	2.87	1.16	=	1,821	2.1	16.5%	4,789	0.8	6.0%	12.5	3.2%	Dec
															Averages	3.1	23.4%		1.3	8.8%	13.6	1.7%	
S&P 500	*SPX*	SPX Ir	1,340	1	=	1,340	596	99.58	26.00	=	669	112.91	28.47	=	754	**1.9**	**15.9%**	1,107	**1.2**	**10.2%**	11.9	2.1%	

Plus Percentage Change in Price/Book	5.4%
Minus Percentage Change in ROE 2012...	0.4%
Equals Percentage change in P/E 2012	5.0%
P/E Last Month 2012...	12.9
Current P/E 2012	13.6







Price to Book vs ROE
7.0
6.0
5.0
4.0
3.0
2.0
1.0
0.0
Price to Book
CCK
PLL
HRC
MMM
PPG
CBE
PH
ITW
DOV
SON
0%
10%
20%
30%
40%
50%
60%
Return on Equity

Price to Sale vs Return on Sale
2.5
2.0
1.5
1.0
0.5
0.0
Price to Sale
PLL
MMM
HRC
CBE
DOV
ITW
Averages
SPX
PH
PPG
SON
CCK
EK
-5%
0%
5%
10%
15%
20%
Return on Sale

FOOD

Company	Code		Price	X Shares Outstanding	=	Market Cap	Equity 10A	EPS 11E	Div 11E	=	Equity 11E	EPS 12E	Div 12E	=	Equity 12E	Price/ Book	ROE 12E	Projected Sales 12E	Price/ Sales	ROS 12E	P/E 12E	Yield	FYE
Altria	***MO***	MO US	26.53	2,093	=	55,538	5,227	2.04	1.59	=	6,186	2.20	1.71	=	7,193	8.3	68.7%	17,715	3.1	25.9%	12.1	6.5%	Dec
ConAgra	***CAG***	CAG U	25.90	409	=	10,590	4,709	1.80	0.93	=	5,063	1.96	0.99	=	5,459	2.0	15.2%	13,165	0.8	6.1%	13.2	3.8%	May
Campbell Soup	***CPB***	CPB U	34.65	321	=	11,123	929	2.45	1.13	=	1,352	2.48	1.20	=	1,761	7.1	51.1%	7,872	1.4	10.1%	14.0	3.5%	Jul
Dr Pepper Snapple	***DPS***	DPS U	42.15	221	=	9,330	2,459	2.75	1.11	=	2,822	3.00	1.23	=	3,214	3.1	22.0%	6,131	1.5	10.8%	14.1	2.9%	Dec
General Mills	***GIS***	GIS US	37.35	638	=	23,844	6,612	2.62	1.19	=	7,523	2.84	1.29	=	8,510	3.0	22.6%	16,316	1.5	11.1%	13.2	3.5%	May
Heinz (HJ)	***HNZ***	HNZ U	53.62	322	=	17,252	3,307	3.35	1.92	=	3,766	3.65	2.07	=	4,276	4.3	29.2%	12,256	1.4	9.6%	14.7	3.9%	Apr
Hershey	***HSY***	HSY U	57.41	165	=	9,465	938	2.81	1.37	=	1,175	3.08	1.48	=	1,439	7.2	38.8%	6,283	1.5	8.1%	18.7	2.6%	Dec
Kellogg	***K***	K US	55.40	363	=	20,103	2,154	3.48	1.66	=	2,815	3.80	1.76	=	3,555	6.3	43.3%	13,632	1.5	10.1%	14.6	3.2%	Dec
Kraft	***KFT***	KFT U	35.47	1,758	=	62,352	35,942	2.23	1.20	=	37,765	2.50	1.24	=	39,987	1.6	11.3%	55,206	1.1	8.0%	14.2	3.5%	Dec
Coca Cola	***KO***	KO US	68.09	2,289	=	155,875	31,317	3.85	1.87	=	35,852	4.28	2.06	=	40,923	4.1	25.5%	48,561	3.2	20.2%	15.9	3.0%	Dec
Mead Johnson	***MJN***	MJN U	69.04	204	=	14,108	(358)	2.71	0.99	=	(6)	3.09	1.09	=	402	NM	NM	3,870	3.6	16.3%	22.4	1.6%	Dec
PepsiCo	***PEP***	PEP U	70.19	1,581	=	110,946	21,476	4.50	2.04	=	25,366	4.92	2.21	=	29,642	4.0	28.3%	69,637	1.6	11.2%	14.3	3.2%	Dec
Sara Lee	***SLE***	SLE U	19.32	585	=	11,304	1,515	0.83	0.46	=	1,732	1.06	0.50	=	2,059	6.0	32.6%	9,351	1.2	6.6%	18.3	2.6%	Jun
															Averages	4.4	29.1%		1.7	10.7%	15.6	3.1%	
S&P 500	***SPX***	SPX Ir	1,340	1	=	1,340	596	99.58	26.00	=	669	112.91	28.47	=	754	**1.9**	**15.9%**	1,107	**1.2**	**10.2%**	11.9	2.1%	

Plus Percentage Change in Price/Book	-2.4%
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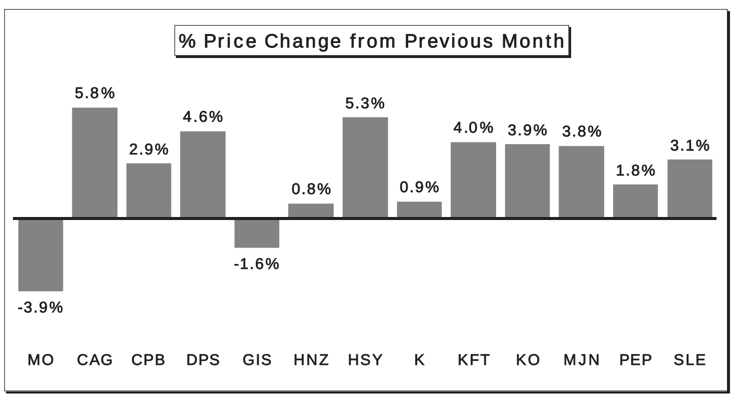
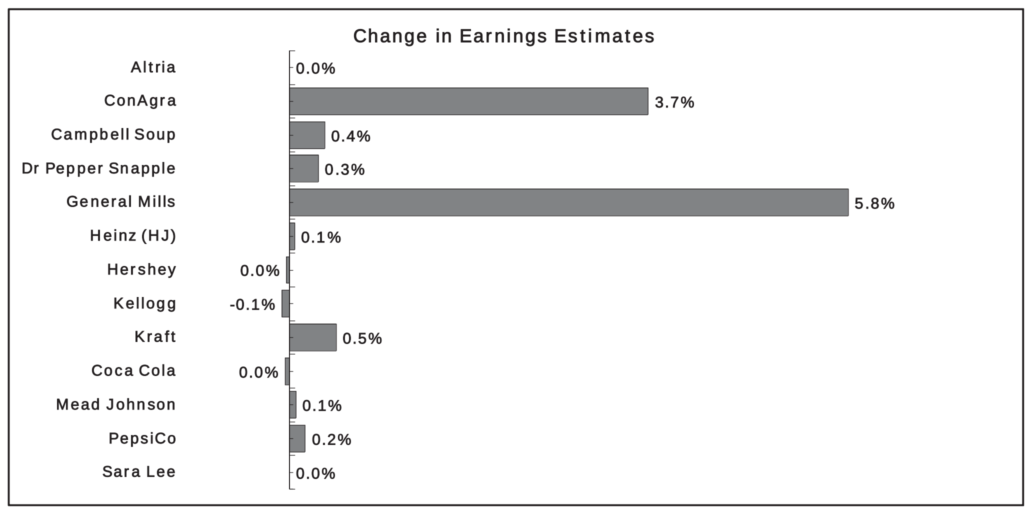
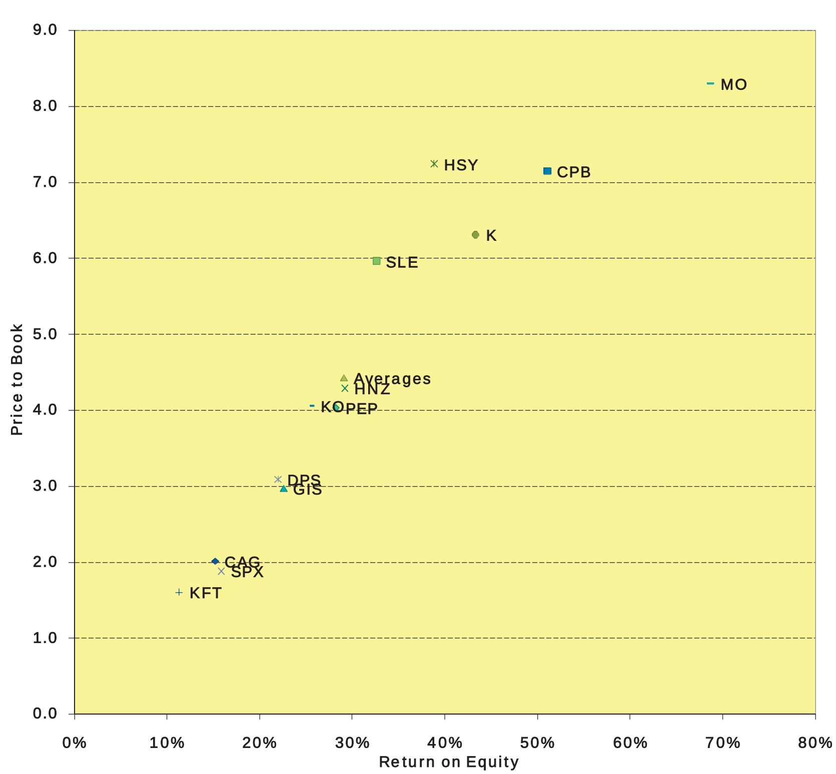
P/E Last Month 2012..	15.3
Current P/E 2012	15.6

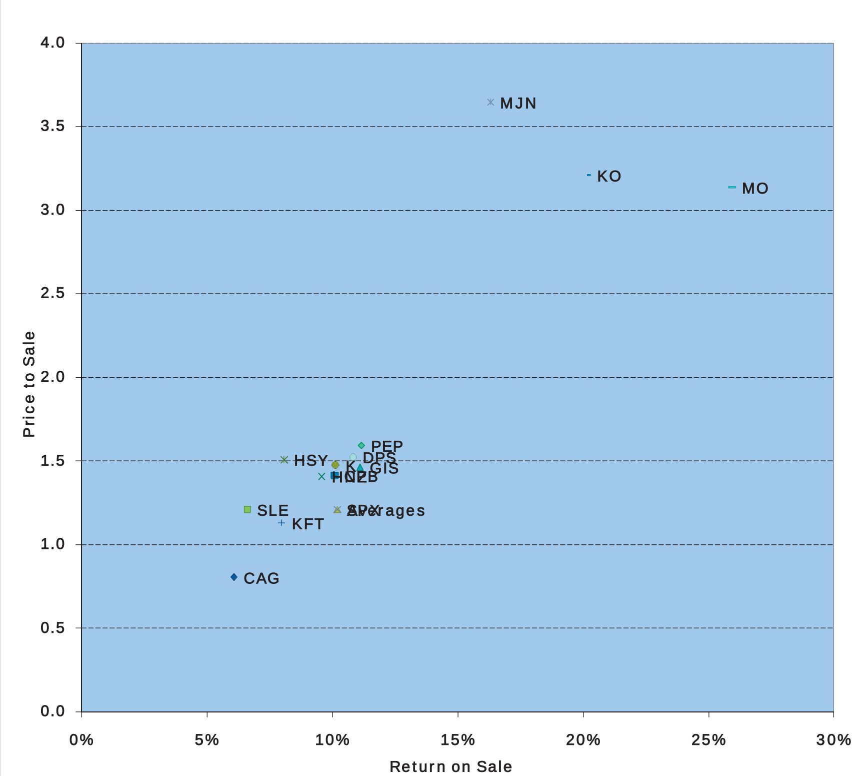




Price to Book vs ROE



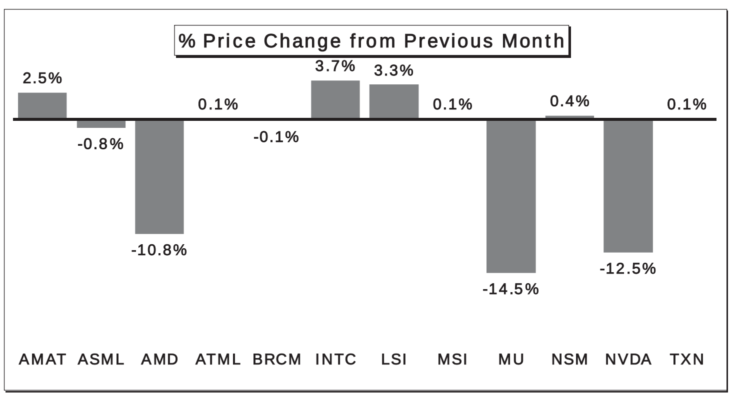
Price to Sale vs Return on Sale

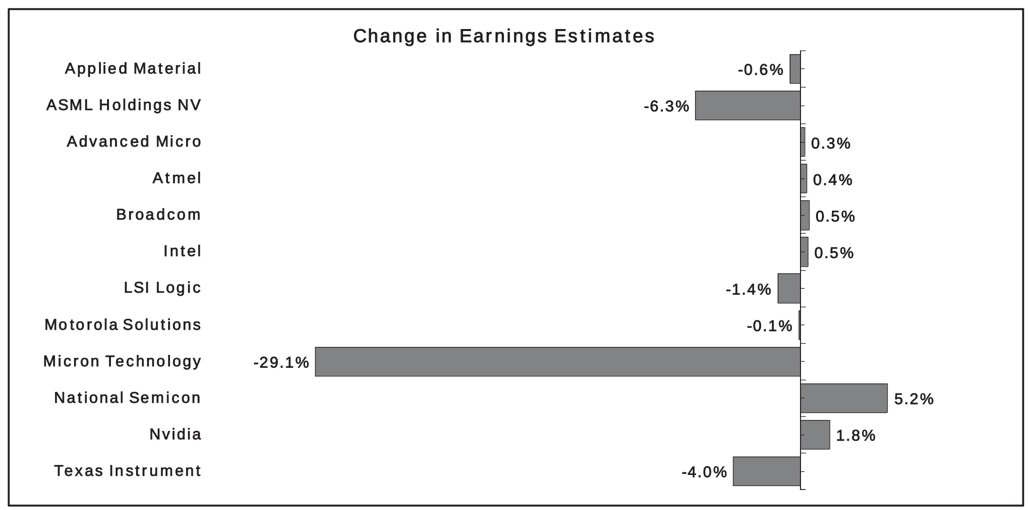


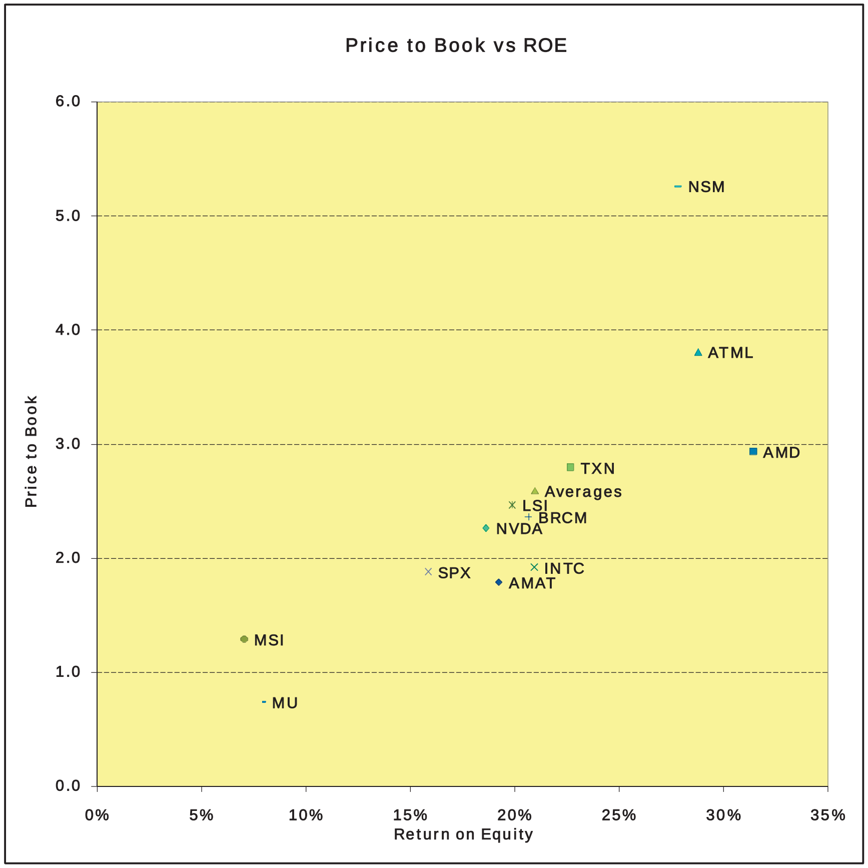
SEMICONDUCTORS

Company	Code		Price	X Shares Outstanding	Market Cap	Equity 10A	EPS 11E	Div 11E	Equity 11E	EPS 12E	Div 12E	Equity 12E	Price/ Book	ROE 12E	Projected Sales 12E	Price/ Sales	ROS 12E	P/E 12E	Yield	FYE
Applied Material	**AMAT**	AMAT	13.29	1,318	17,520	7,536	1.42	0.29	9,038	1.43	0.30	10,530	1.8	19.2%	10,896	1.6	17.3%	9.3	2.2%	Oct
ASML Holdings NV	**ASML**	ASML	37.94	431	16,363	3,022	3.17	0.55	4,152	2.89	0.40	5,225	3.5	26.6%	5,339	3.1	23.3%	13.1	1.1%	Dec
Advanced Micro	**AMD**	AMD U	7.11	688	4,888	1,020	0.56	-	1,404	0.76	-	1,927	2.9	31.4%	7,139	0.7	7.3%	9.3	0.0%	Dec
Atmel	**ATML**	ATML	14.32	457	6,549	1,053	0.92	-	1,472	1.08	-	1,967	3.8	28.8%	2,211	3.0	22.4%	13.2	0.0%	Dec
Broadcom	**BRCM**	BRCM	34.41	537	18,464	5,826	2.75	0.36	7,111	3.01	0.37	8,531	2.4	20.7%	8,338	2.2	19.4%	11.4	1.1%	Dec
Intel	**INTC**	INTC U	22.53	5,302	119,454	49,430	2.32	0.75	57,722	2.46	0.78	66,593	1.9	20.9%	56,151	2.1	23.2%	9.2	3.5%	Dec
LSI Logic	**LSI**	LSI US	7.25	606	4,391	1,318	0.47	-	1,602	0.58	-	1,956	2.5	19.9%	2,194	2.0	16.1%	12.4	0.0%	Dec
Motorola Solutions	**MSI**	MSI U	46.50	340	15,788	10,987	2.35	-	11,783	2.53	-	12,643	1.3	7.0%	8,666	1.8	9.9%	18.4	0.0%	Dec
Micron Technology	**MU**	MU US	7.83	1,001	7,842	9,816	0.32	-	10,140	0.83	-	10,976	0.7	7.9%	9,723	0.8	8.6%	9.4	0.0%	Aug
National Semicon	**NSM**	NSM U	24.66	243	5,988	851	1.17	0.42	1,034	1.30	0.44	1,243	5.3	27.8%	1,633	3.7	19.4%	18.9	1.8%	May
Nvidia	**NVDA**	NVDA	16.15	600	9,692	3,181	1.16	-	3,880	1.33	-	4,677	2.3	18.6%	4,489	2.2	17.7%	12.2	0.0%	Jan
Texas Instrument	**TXN**	TXN U	33.52	1,161	38,922	10,437	2.43	0.52	12,651	2.72	0.54	15,176	2.8	22.7%	14,881	2.6	21.2%	12.3	1.6%	Dec
												Averages	2.6	21.0%		2.1	17.2%	12.4	0.9%	
S&P 500	***SPX***	SPX Ir	1,340	1	1,340	596	99.58	26.00	669	112.91	28.47	754	**1.9**	**15.9%**	1,107	**1.2**	**10.2%**	11.9	2.1%	

Plus Percentage Change in Price/Book	-9.7%
Minus Percentage Change in ROE 2012...	-6.5%
Equals Percentage change in P/E 2012	-3.2%
P/E Last Month 2012...	12.4
Current P/E 2012	12.4






Price to Book vs ROE
Price to Book
Return on Equity
6.0
5.0
4.0
3.0
2.0
1.0
0.0
0%
5%
10%
15%
20%
25%
30%
35%
NSM
ATML
AMD
TXN
Averages
LSI
BRCM
NVDA
SPX
INTC
AMAT
MSI
MU


Price to Sale vs Return on Sale
Price to Sale
Return on Sale
4.0
3.5
3.0
2.5
2.0
1.5
1.0
0.5
0.0
0%
5%
10%
15%
20%
25%
NSM
ATML
TXN
BRCM
NVDA
Averages
INTC
LSI
MU
MSI
AMAT
SPX
AMD

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Relative Value Model

Sector	Company	Advice	Price	52 week Low/Hi	P/E 2012
Metals					
Oil					
Chemicals					
Paper & Forest Products					
Transportation					
Manufacturing					
Elec. & Mfg Equipment	**3M**	**Buy**	**$ 97.97**	**68 / 98**	**13.6**
Automobile					
Housing					
Lodging & Restaurants					
Retail	**Nike**	**Sell**	**$ 93.66**	**66 / 94**	**16.3**
Real Estate	**SL Green**	**Buy**	**$ 87.54**	**50 / 90**	**17.9 FFO**
Food	**Kraft**	**Buy**	**$ 35.93**	**28 / 36**	**14.2**
	Dr Pepper Snapple	**Buy**	**$ 41.65**	**37 / 42**	**14.1**
Media / Entertainment					
Consumer Products					
Hospital					
Pharmaceutical	**Pfizer**	**Buy**	**$ 20.23**	**14 / 21**	**9.0**
Computers	**Cisco**	**Buy**	**$ 15.90**	**15 / 26**	**9.3**
Semiconductors	**NVIDIA**	**Buy**	**$ 15.73**	**9 / 26**	**11.7**
Software	**Microsoft**	**Buy**	**$ 26.77**	**23 / 29**	**9.4**
	Oracle	**Buy**	**$ 34.09**	**22 / 37**	**12.4**
Aerospace					
Financial	**iShares Financial**	**Buy**	**$ 57.67**	**48 / 62**	**N/A**